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CENTURY OF SERVICE
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February 9-13, 1985

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Soundoff

Jerry Campagna's solutions to beer wholesaler problems

In Chicago at the InterBev '84 Congress, Gerald Campagna, president of C&K Distributors, Inc., (which handles Heileman's Old Style in Chicago) explained that he had stolen this thought from Professor Herb True at a seminar he had attended.

"'In countries where they do not have the word stuttering in the language, nobody stutters.' Now think about that for a moment and apply it to the beer business

". . .when I became president of C&K and looked at their discount structure they were giving two cases with every 15 they sold and everyone was selling **17 cases**. I, a smalltown boy in the Big City, changed the deal to 14 with 105 — same darn thing — but suddenly we were selling **119 case orders**!

". . . beer companies that do not have 100 case deals do not sell any."

Campagna went on to discuss his firm's experiment with 500-, 1,000-, 2,000- and 5,000-case orders and concluded with this point: ". . . Look at what your company is offering to the public. Revise it. Change it. . . Be daring. Be innovative. If there is a question regarding the legality of something, do it!" □

BEVERAGE INDUSTRY (ISSN-0148-6187) is published monthly by Magazines For Industry, Inc., a subsidiary of Harcourt Brace Jovanovich Publications. Corporate and Editorial offices: 7500 Old Oak Boulevard, Cleveland, Ohio 44130. Advertising offices: 747 Third Avenue, New York, New York 10017 and 111 East Wacker Drive, Chicago, Illinois 60601. Accounting, Advertising Production and Circulation offices: 1 East First Street, Duluth, Minnesota 55802. Subscription rated: $35 per year in the United States; $45 per year in Canada. All other countries, $70 per year. Single copies (prepaid only): $2 in the U.S.; elsewhere $6.00; add $3.00 for shipping and handling per order. Second class postage paid at Duluth, Minnesota 55806 and additional mailing offices.

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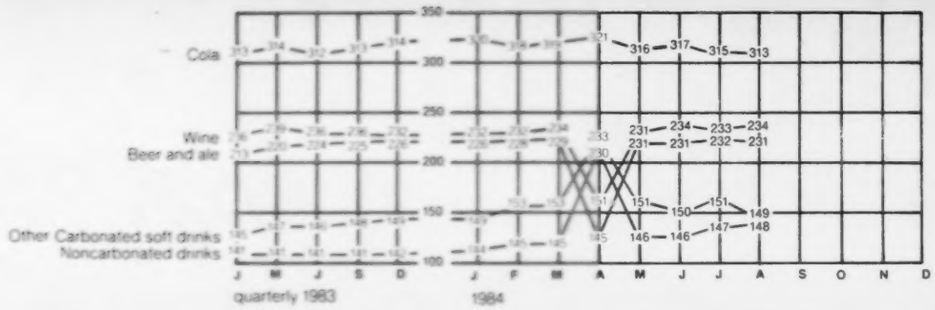
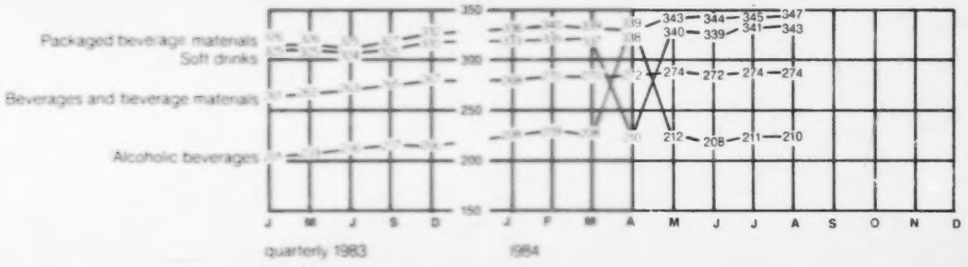
Beverage Business Indicators*

1984 CONSUMER PRICE INDEX (1967 = 100)

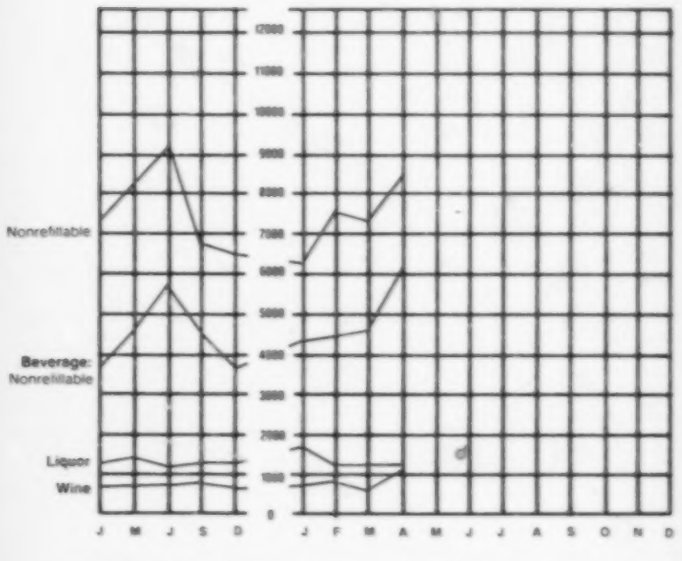


1984 PRODUCER PRICE INDEX (1967 = 100)



BOTTLE SHIPMENTS

(thousands of gross)



IMPORTED BEVERAGES

(proof gals)

	June 1984	July 1984	% Change	July 1983	July '83 vs. July '84 % Change
Beer*	18,298,934	24,815,053	35.6	18,922,755	31.1
Whiskey	6,693,152	6,687,133	(0.1)	4,121,614	62.2
Brandy	368,847	514,524	39.5	369,449	39.3
Gin	438,609	578,785	32.0	564,845	2.5
Rum	391,967	249,527	(36.3)	150,648	65.6
Cordials & liqueurs	540,724	859,191	58.9	642,349	33.8
Others	954,026	1,138,612	19.3	627,778	81.4
Total	27,685,959	36,718,762	32.6	25,399,438	44.6
Sparkling wines	862,778	1,049,643	21.7	737,920	42.2
Still wines, table	8,964,664	12,243,946	36.6	9,122,165	34.2
Still wines, fortified	131,663	164,319	24.8	159,627	2.9
Vermouth	182,881	254,112	38.9	126,061	101.6

*Includes ale, stout, porter
Source: National Association of Beverage Importers

ALCOHOLIC BEVERAGE REMOVALS

(barrels of 31 gals)

	May 1984	June 1984	% Change	June 1983	June '83 vs. June '84 % Change
Beer	16,952,046	17,449,461	2.9	17,123,716	1.9
Wine*	32,319,612	33,342,909	3.2	35,210,696	(5.3)
Spirits*	29,747,622	30,191,677	1.5	31,151,321	(3.1)

*wine gals
Source: U.S. Department of the Treasury Bureau of Alcohol, Tobacco and Firearms

CLOSURES FOR BEVERAGES

(thousands of gross)

	April 1984	May 1984	% Change	May 1983	May '83 vs. May '84 % Change
Metal (for spirits, wines)*	83,183	80,670	(3.0)	73,005	10.5
Plastic (for spirits, wines)*	76,128	136,974	79.9	113,017	21.2
Metal Crowns (beer & soft drinks)	10,631	14,703	38.3	15,475	(5.0)
Soft drink (convenience and conventional)	4,476	6,161	37.6	6,481	(4.9)
Beer (convenience and conventional)	6,155	8,542	38.8	8,994	(5.0)
All other metal closures other than crowns	7,335	9,105	24.1	7,624	19.4

*thousands of units
Source: U.S. Department of Commerce Bureau of the Census

Compiled by Market Data Communications (MDC) for Beverage Industry

Retailers, industry form Florida BIRP

ORLANDO, FL—Florida's beverage industry and food retailers have joined forces with recyclers to organize a statewide network of recycling centers for non-returnable beverage containers and other recyclable materials.

The Florida Beverage Industry Recycling Program, or Florida BIRP, is modeled after successful BIRP programs across the country.

Over 75 members

Created to control Florida's litter and solid waste problem, the program has been under development for two years. Centers will be independently owned and operated, and involve soft drink bottlers, beer distributors, supermarkets, convenience stores, suppliers, industry associations and independent recyclers. Over 75 companies have joined thus far.

Each BIRP center will be equipped to handle both aluminum and steel cans, glass bottles and jars of every color, PET bottles, newspaper and corrugated paper.

"The problem of eliminating litter and waste has been a major concern of the beverage industry in Florida for some time," says BIRP President Jon Courson.

"We've spent the last two years looking for an efficient and economical way to recover beverage containers and have now found that answer in BIRP."

And while beverage-related litter accounts for only 20% of rural and 11% of urban litter, BIRP will work toward becoming a total solution to comprehensive Florida waste recycling, Courson notes.

Models for Florida BIRP

Program Name	Kentucky BIRP	Arizona BIRP	Maryland BIRP	MSDRecycle*
Year started	1980	1971	1978	1980
Number of centers	35	29	129	25
Jobs created	120	75	N/A	40
Materials recycled (in pounds)				
Time period	9/80-3/84	4/71-6/84	1/83-6/84	2/80-6/84
Aluminum & steel cans	63,612,000		3,865,000**	
Glass	215,000		2,515,000	
Plastic	500	Breakdown not Available	N/4	Breakdown not Available
Newspaper & corrugated paper	26,186,000		4,400,000	
Total	113,047,000	333,000,000	10,780,000	40,000,000
Total payout to public	$15,255,007	$37,000,000	$1,044,000	$4,000,000

Note: Figures are approximate. Pounds purchased may vary from pounds actually recycled because of donated materials.
* Now Minnesota BIRP (Business & Industry Recycling Program)
** Bi-metal cans included also

Source: Florida BIRP

Copyright: Beverage Industry January 1985

He anticipates it will take at least 100 recycling centers to properly serve the state. The program will absorb existing recyclers and scrap dealers into the system.

Since its creation in September 1980, Kentucky BIRP has paid out more than $15 million to citizens for 113 million pounds of material.

BIRP'S 35 centers are currently collecting nearly 70% of aluminum cans sold in Kentucky. This voluntary recycling program has paid off for the state to the tune of $53 million during the past three-and-a-half years.

BIRP centers have realized success in a number of other states, including Arizona, Maryland and Minnesota, and are being considered for adoption in many more.

"The fact that BIRPs are now operating or being considered in almost half the states in the country is a strong testimonial to the future success of BIRP in Florida," Courson points out.

BIRPs throughout the country are working to counter the threat of deposit laws. He explains that forced deposit laws add unnecessary costs to everyone, while voluntary programs achieve the same goals without the unpleasant side effects.

Sizable investment

In order to comply with deposit laws in nine states, bottlers, retailers and distributors have had to make sizable investments in labor, equipment and storage space to handle returns.

In Michigan, for example, wholesalers had to add 35% more trucks for transporting empties, resulting in 4.4 million additional gallons in fuel consumption the first year.

They added 60% more warehouse space for equipment and storage, and 25% more hourly employees to sort, load and handle empties.

At the retail level, a major New York supermarket chain spent over $200,000 the first year of the deposit law to sort and store empties.

"With voluntary recycling, however, everyone benefits," Courson says. "Litter and solid waste are reduced. Individuals and groups gain additional income. Profitable new businesses and jobs are created in the field of recycling, and manufacturers can take advantage of the lower cost of recycled raw materials. Best of all, these things are accomplished at no cost to the consumer." □

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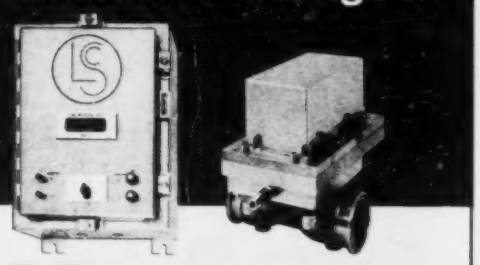

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Wine exports get a boost

WASHINGTON, DC—Congress has taken an initial step toward increasing exports of American wine.

With the Wine Equity and Export Expansion Act signed into law, congress is attempting to eliminate or reduce trade barriers on exports of U.S.-made wine into other countries.

"First the President will determine major trade countries," explained Marshall Newman, spokesman for the Wine Institute, supporter of the legislation.

"Then he will appoint trade representatives to consult with each country to try to eliminate any trade barriers," Newman said.

According to Wine Institute, the measure may work toward balancing U.S. wine exports, which totaled $32.1 million in 1983. Imports totaled $853.7 million. □

The president's choice

Purchasing decentralizing, but top titles still call shots

by Paul E. Mullins
Editor

SURVEY ANALYSIS—As the soft drink industry continues to consolidate, the final purchasing decision is moving down the chain of command, but the president/owner and/or the person in charge of subsidiary plants and smaller companies still have the final say-so in the majority of cases.

In the beer wholesaling industry, the decision-making authority is even more top heavy with more than 91% of the decisions on fleet and 68% of the decisions on materials handling equipment purchases being made at the presidential levels.

These are the results of a recent **Beverage Industry** survey on purchasing practices in the soft drink industry. A total of 8,000 questionnaires were mailed and at presstime, with more coming in, a total of 1,495 responses had been received, a 18.3% return. (See "About the survey" page 51.)

Although the final decision making authority still is heavily vested in the top officer's responsibilities, there are a number of areas — fleet, vending, production — where the influence of executives who are specifically responsible for these functions is becoming greater.

Since this is the first time **BI** has conducted this survey, there is no comparative information against which change can be judged. However, a number of long time beverage industry suppliers were asked to review the data. This comment is typical of the overall reaction: "Yes, the numbers are high for the top officials, but if you had done the survey several years ago, they would have been even higher."

Purchasing agents

Although executives with this title are becoming more commonplace, the assignment of this special function was, until recently, a rarity in the beverage business. In fact, it still is in the single-plant operation category.

Responsibilities of purchasing agents vary greatly depending primarily on the size of the operation and the category of supplies being purchased. As a general rule, these executives will:

- Have recommendation authority on almost all of the items purchased.
- Have more final decision authority in certain areas, primarily ingredients in the larger operations.

Single plant purchasing patterns

Decision making in these plants is more in line with what has always been the traditional soft drink industry purchasing patterns. As one respondent volunteered on his questionnaire: "In small plants, presidents do it all."

Not all of the respondents, however, were small. Surveys were returned from 43 single plant operations with sales in excess of $25 million. In these larger facilities, the trend toward authorizing the person with the line responsibility to the make the final decision is evident.

Presidents and general managers in this group make 91.6% of the final decisions on fleet purchases. General managers make 57.1% of the recommendations and are the most influential.

Vending decisions are also made primarily at the top with 77.7% of these decisions being made by either the president or the number two executive. Sales personnel make 16.6% of the final decisions.

Of those top executives who don't make the final decision, 50% of them make recommendations or specifications. Surprisingly only 3.2% of specifications/recommendations come from vending specialists in this group of plants.

Presidents and other chief executives also account for a combined total of 92.9% of all final decisions on production equipment. 10% of final decisions are being made by production officials who also make 21.2% of the recommendations.

Production managers also make 12.5% of the final decisions on packaging equipment, 14.6% of the final decisions on ingredients and 14.9% of the final decisions on materials handling equipment.

The final decisions on these three categories is made by the president or general manager.

Multiple plant/independent purchasing patterns

Size of operations represented in this group ranged from $3 million to $50 million with almost 70% in the over-$25 million group.

This group clearly demonstrates the trend to decentralizing pruchasing decisions. For example, 46.2% of the final fleet purchase decisions are made by executives with fleet responsibilities. Almost one-fourth of all the production equipment and materials handling equipment final decisions are also made by production officials.

Presidents also play less of a role in these plants. They make 25.6% of the final decisions on fleets, 16.3% of the final decisions on vending equipment, 21.3% on production equipment, 26.8% on packaging equipment, 22.7% on materials handling equipment and only 13.9% of the final decisions on ingredients.

Vending managers make 34.6% of the final decisions on vending equipment purchases. They get recommendations and specifications from general managers (52.6%) and presidents (42%).

General managers and other top officials are the most influential group in this category of plants. They are responsible for 54.5% of the decisions on materials handling and are the primary final decision maker for ingredients and packaging and production equipment.

Multiple plant/conglomerate purchasing patterns

More of the final purchasing decisions in this group of plants are made by the person responsible for the function than in any other.

Vending managers, for example, make 41.7% of the final decisions on vending equipment.

Production managers make 56% of the decisions on pro-

Beer wholesaler purchases

Title	Fleet make decision	Fleet specify/recommend	Materials handling make decision	Materials handling specify/recommend
President/owner	91.3%	4.5%	68.2%	14.3%
Executive titles	6.5%	18.1%	4.6%	14.3%
Fleet titles	2.2%	36.4%		
Production Titles (warehouse mgr.)		40.9%	31.2%	71.4%

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Fleet purchasing decisions

Titles	Make decision	Specify/recommend
Single plant operations		
President/owner	52.1%	9.5%
Executive titles	39.5%	57.1%
Fleet titles	0.0%	4.8%
Sales titles	2.1%	14.3%
Production titles	4.2%	4.8%
Vending titles	0.0%	9.5%
Purchasing titles	2.1%	4.8%
Multiple plant/independent		
President/owner	25.6%	0.0%
Executive titles	28.2%	52.0%
Fleet titles	46.2%	4.0%
Sales titles	0.0%	28.0%
Purchasing titles	0.0%	16.0%
Multiple plant conglomerate		
President	22.7%	6.5%
Executive titles	36.3%	35.5%
Fleet titles	31.6%	35.5%
Sales titles	0.0%	12.9%
Production titles	9.1%	0.0%
Purchasing titles	0.0%	9.8%
Franchise company-owned plants		
President	18.2%	0.0%
Executive titles	54.5%	21.4%
Fleet titles	18.1%	78.6%
Sales titles	9.1	0.0%

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Vending equipment purchasing decisions

Titles	Make decision	Specify/recommend
Single plant operations		
President/owner	44.4%	16.6%
Executive titles	33.3%	50.0%
Sales titles	16.6%	16.8%
Vending titles	3.7%	11.1%
Purchasing titles	1.8%	0.0%
Multiple plant independents		
President/owner	16.3%	42.1%
Executive titles	22.4%	52.6%
Fleet titles	0.0%	5.2%
Sales titles	18.4%	0.0%
Vending titles	34.5%	0.0%
Purchasing titles	6.1%	0.0%
Multiple plant conglomerate		
President	20.8%	5.3%
Executive titles	29.1%	36.8%
Fleet titles	0.0%	5.3%
Sales titles	8.3%	21.1%
Vending titles	41.7%	21.1%
Purchasing titles	0.0%	10.5%
Franchise company-owned plants		
President	16.6%	0.0%
Executive titles	41.6%	27.2%
Sales titles	16.6%	54.5%
Vending titles	25.0%	0.0%

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Packaging equipment purchasing decisions

Single plant operations

Titles	make decision	specify/recommend
President/owner	44.7%	10.5%
Executive titles	40.4%	47.5%
Sales titles	0.0%	15.8%
Production titles	14.9%	21.0%
Purchasing titles	0.0%	5.3%
Multiple plant/independent		
President/owner	26.8%	0.0%
Executive titles	46.3%	63.2%
Sales titles	17.1%	0.0%
Production titles	17.1%	0.0%
Purchasing titles	9.7%	36.8%
Multiple plant/conglomerate		
President	15.6%	5.5%
Executive titles	46.9%	50.0%
Sales titles	0.0%	5.5%
Production titles	11.0%	10.5%
Purchasing titles	3.1%	27.7%
Franchise company-owned plants		
President	12.5%	0.0%
Executive titles	62.5%	55.5%
Sales titles	0.0%	33.3%
Production titles	25.0%	11.1%

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Ingredient purchasing decisions

Single plant operations

Titles	make decision	specify/recommend
President/owner	36.7%	27.7%
Executive titles	45.5%	33.3%
Sales titles	0.0%	16.6%
Production titles	14.6%	16.6%
Vending titles	2.1%	5.5%
Multiple plant/independent		
President/owner	13.9%	26.7%
Executive titles	37.2%	14.6%
Sales titles	4.7%	0.0%
Production titles	6.9%	3.2%
Vending titles	2.3%	4.6%
Purchasing titles	20.9%	31.3%
Quality control	13.9%	19.8%
Multiple plant/conglomerate		
President	14.3%	5.5%
Executive titles	57.1%	44.4%
Production titles	25.0%	16.6%
Vending titles	3.	33.3%
Purchasing titles	3.6%	
Franchise company-owned plants		
Executive titles	42.8%	66.6%
Production titles	57.1%	33.3%

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duction equipment and 34.3% of the final decisions on packaging equipment. They are also important in the ingredient area, making 25% of the final decisions.

Fleet managers, although not the primary decision makers, account for almost one-third of all purchases in this area.

In instances where the person in charge of the function is not responsible for making the final purchasing decision, the primary influence is the "man in charge of the operation" — vice presidents, general managers, etc. In those categories where these executives don't make the final decisions, they out number all other groups of executives when it comes to recommending or specifying equipment.

The top executives make 36.3% of the final decisions on fleet purchases, 29.1% of the final decisions on vending equipment, 28% of the final decisions on production equipment, 46.9% of the final decisions on packaging equipment, 56.5% of the final decisions on materials handling equipment, and 57.1% of the final decisions on ingredients.

Presidents of these firms play less of a role in purchasing, but many do play the final decision making role. Their final decision control accounts for between 14%-22.7% of purchases in the six areas.

Franchise company owned plant purchasing patterns

Final purchase decisions in these plants vary across the board and include franchise company personnel, regional officials and plant personnel.

A number of presidents get involved in final decision making in theses plants: 18.2% of the final decisions on fleet purchases; 16.6% of the final decisions on vending, 14.3% of the final decisions on production equipment, 12.5% of the final decisions on packaging equipment, and 9.1% of the final decisions on materials handling equipment are made by these executives.

The executive in charge of the subsidiary plant is the primary final decision maker. 54.5% of the fleet decisions, 41.6% of the vending equipment decisions, 71.4% of the production equipment decisions, 62.5% of the packaging equipment decisions, 54.5% of the materials handling decisions and 42.8% of the ingredient decisions are made by these plant executives.

The advisory role of specialized executives in these plants is also an important factor. Although fleet personnel make only 18.1% of the final decisions on fleet purchases, they have the recommendation or specification responsibility in 78.6% of the cases.

Production specialists only make 14.3% of the final purchase decisions on production equipment, but recommend or specify on 45.5% of them.

These executives also make 57.1% of the final decisions on ingredients.

Wholesaler purchasing patterns

Beer wholesalers basically purchase two major items: fleet trucks and materials handling equipment. Because most of these firms are lean at the top, the president makes most of the final decisions on both categories.

The **BI** study shows that 91.3% of final fleet decisions are made by these individuals. General managers make 6.5% of the fleet purchase decisions and 2.2% of the decisions are made by fleet managers.

Indicating that the chief executives do not make deci-

Production equipment purchasing decisions

Single plant operations

Titles	Make decision	specify/recommend
President/owner	48.3%	5.5%
Executive titles	44.6%	51.3%
Sales titles	0.0%	10.8%
Production titles	10.0%	21.1%
Vending titles	0.0%	5.5%
Purchasing titles	0.0%	5.75%
Multiple plant/independent		
President/owner	21.3%	15.7%
Executive titles	44.6%	17.6%
Sales titles	0.0%	5.9%
Production titles	23.4%	37.3%
Purchasing titles	6.3%	11.7%
Multiple plant/conglomerate		
President	16.0%	7.1%
Executive titles	28.0%	50.0%
Production titles	56.0%	14.3%
Purchasing titles	0.0%	28.6%
Franchise company-owned plants		
President	14.3%	0.0%
Executive titles	71.4%	36.4%
Sales titles	0.0%	45.5%

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Material handling equipment purchasing decisions

Single plant operations

Titles	make decision	specify/recommend
President/owner	44.6%	10.5%
Executive titles	41.1%	47.4%
Sales titles	0.0%	15.7%
Production titles	12.5%	21.1%
Purchasing titles	1.9%	5.3%
Multiple plant/independent		
President/owner	22.7%	0.0%
Executive titles	54.5%	0.0%
Fleet titles	2.3%	27.7%
Sales titles	11.4%	5.5%
Production titles	6.8%	22.2%
Purchasing titles	2.3%	44.4%
Multiple plant/conglomerate		
President	21.8%	6.6%
Executive titles	58.5%	40.2%
Fleet titles	4.3%	6.6%
Sales titles	13.1%	26.6%
Production titles	13.1%	26.6%
Purchasing titles	4.3%	21.1%
Franchise company-owned plants		
President	9.1%	0.0%
Executive titles	54.5%	55.0%
Production titles	36.3%	45.0%

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About the survey

Each respondent was asked to provide his or her job title, a brief description of their responsibilities and to indicate whether they had the final decision, specify or recommend authority in each of six areas: fleet, vending, production, packaging, materials handling and ingredients.

Each was also asked to identify the type of operation in which they worked. The choices were: single plant independent, multiple-plant independent, multiple plant operation owned by a conglomerate and franchise company owned plants. Respondents were also asked to indicate the size of their company by sales volume.

The company classificataions are defined as follows:

Single plant operations — In these plants, production is under one roof; they may or may not service warehouse distribution points.

Multiple plant/independents — This category is basically those firms which operate multiple plants, all of which produce beverages. Joyce Beverages, Mid-Atlantic Coca-Cola would be typical examples.

Multiple plant/conglomerate — These firms are multiple plant operations owned by another firm with holdings in the nonbeverage area. General Cinema, MEI, Westinghouse would be representative examples.

Franchise company-owned plants — Included here are firms which the franchisor owns outright and totally. The category does not include firms for which the franchisor has provided funds for leveraged buyouts. PBG and the Atlanta Coca-Cola Bottling Co. are examples.

Titles and job responsibilities which go with those titles vary in the beverage industry. For that reason, BI requested respondents to provide a brief description of their duties. Title classifications would be as follows.

Presidents/owners — These titles also include chairmen and CEO responses.

Executive titles — Basically these titles were those of people who were not president or owners but who described themselves as being "in charge" of a firm or location. Representative titles would be vp-operations, operations director, regional vice president (but not regional vp-sales). Depending upon their job descriptions, in some cases plant managers and general managers were included.

Sales titles — These were sales managers, district or regional marketing titles.

Production titles — Included in this group were all responses from anyone whose title connected them with production, including vp-production, general manager-production, production manager. All manufacturing and engineer titles were also included in this group.

Vending titles — In addition to the vending manager titles, this group also included all cold bottle titles as well as fountain and food service executives.

Purchasing — In addition to purchasing directors and vp-purchasing titles, this group also included controllers and company treasurers, if they reported that they had any purchasing responsibilities. □

sions in a vacuum, specification and recommendations come from other officials in the distributorship. 40.9% of recommendation/specifications come from warehouse managers; 36.4% come from fleet titles and 18.1% from general managers.

Presidents also control materials handling equipment purchases, but to a lesser degree. 68.2% of final decisions are made by the chief executive.

Warehouse managers make 31.2% of the final decisions and executives with fleet titles are responsible for 4.5% of the final decisions.

When it comes to recommending and specifying, warehouse managers play the dominant role; 71.4% of them fulfill this function. Fleet managers make 14.3% of the recommendations and among presidents who do not make the final decision, 14.3% of them make recommendations. □

Chinese group visits InterBev

CHICAGO—A delegation of engineering experts from the People's Republic of China toured InterBev as part of their research for the food processing, packaging and beverage show they will hold in Peking this spring.

The show, Interteck-Ex Foodpack '85, is scheduled for March 5-14 and is open to all U.S. manufacturers of food and beverage products and equipment, according to U.S. organizer Mary Ann Lynch, president, Lynch and Associates, an international trade and exhibition consultant.

"The purpose of bringing the engineers here is to target the needs, sizes and capacities that the Chinese seek so that the companies here that want to participate can show exactly what their prospects are looking for," Lynch said.

Among the booths visited by the delegation was the FMC Corp., Beverage Equipment Division, where the visitors received an extensive tour. □

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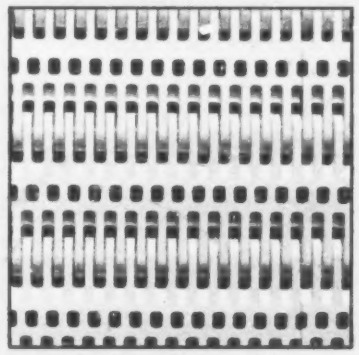

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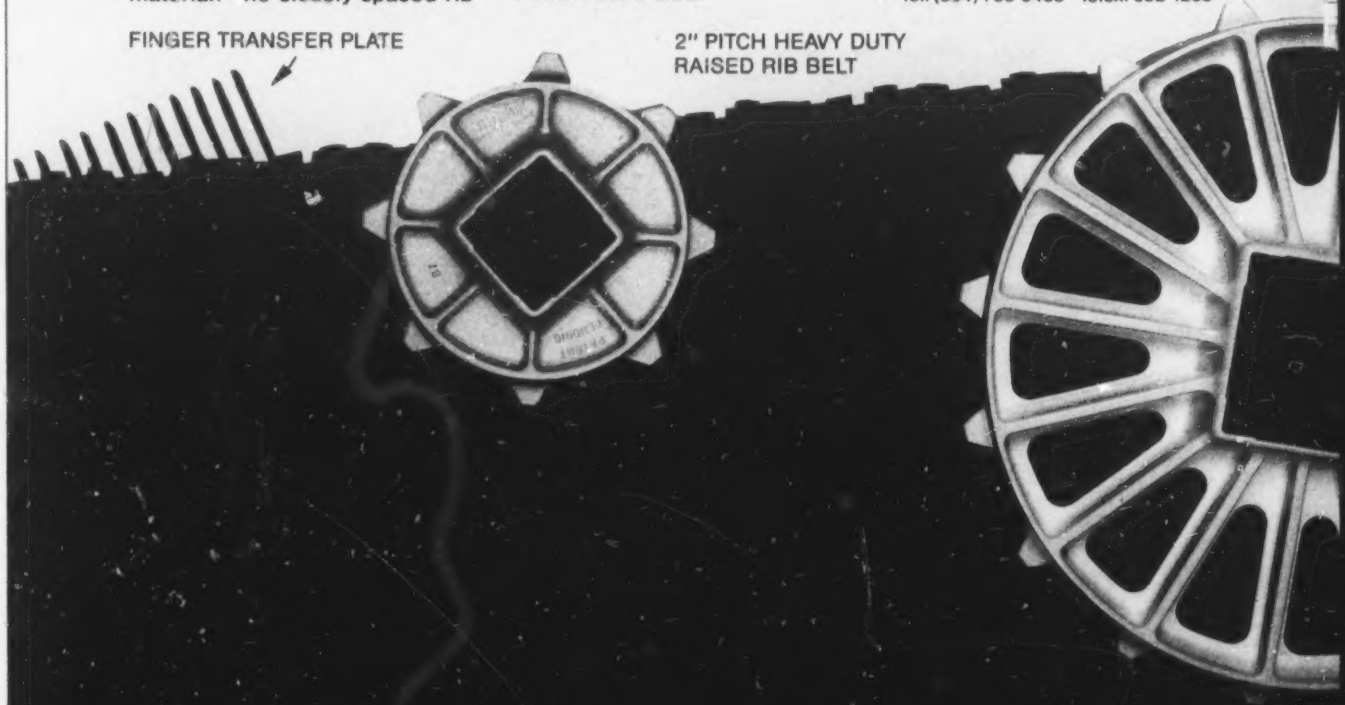

Beer consumption down .6% in 1984

(Continued from page 1)
ing along with the rest of the beverages."

Declining consumption had been projected by a number of industry barometers. In 1983 sales were up only .8% and the previous year, only .3%.

1984 was good for light, popular and imported beers, but their gains did not make up for the losses in the super premiums, premiums and malt liquors.

Light beer increased its total industry share by 8% moving up to 36.4 million barrels, 19.9% of the total. Popular priced brands, the second most important segment, moved up to 42 million barrels, 23% of the total. Imports now account for 3.9% of total consumption, 7.1 million barrels.

Premium priced products still have almost a two-to-one lead and account for 82.3 million barrels sold, 45% of the total. Super premiums — priced on a par with imports in many markets — were down 1.3 million barrels accounting for 9.1 million barrels in sales, 5% of the total market.

It appears that diet and cost-conscious consumers opted for the light and popular brands, while many young urban professionals who want an upscale image were quaffing imports, comments Maxwell.

Flagship brands

Anheuser-Busch is the only domestic brewer that had "meaningful growth," up 5.5%, Maxwell reports.

In fact, all the brands in the Anheuser-Busch stable experienced volume gains except Michelob, which was down slightly to 6.7 million barrels.

Maxwell notes that A-B is the only domestic whose flagship brand moved ahead. Budweiser jumped from 42.7 million beer barrels in 1983 to 44.3 in '84, increasing its market share one full percentage point to 24.2.

A-B also had considerable success with its light brands, Natural Light and Bud Light. Bud Light, up 300,000 barrels, continues to gain at a rate similar to 1983. Natural Light, up 200,000 barrels has reversed last year's sales decline. Although A-B is hopeful that this duo can begin to eat up some of the market share of Miller Lite, the brands only account for a combined total of 5.2 million barrels.

To add yet another dimension to Natural Light, the company recently announced a stepped up marketing campaign for Natural Light using the theme, "The beer with the taste for food." The positioning evidently aims to increase at-home consumption of Natural Light.

Overall, Miller had a volume increase, up 1.3%, thanks to Lite and its new popular brands, Meister Brau and Milwaukee's Best. In fact, Lite jumped into the second spot in the Top 10 brands ahead of Miller High Life, which did not fare as well. Miller's flagship brand dropped from 17 million beer barrels in 1983 to 14.5 in '84.

Problems with this brand have been widely speculated on and at press time, Miller was still reviewing ad agencies in attempt to pump life back into the brand's sagging sales.

Coors' expansion into other markets did not help its sales volume, according to Maxwell. Coors Light was up 700,000 barrels and moved among the Top Ten selling brands. But all of this was negated by a drop in sales of the flagship brand from 9.7 to 8.7 million barrels. Overall, Coors' volume was off 2.2%.

Certainly, other domestics ran into similar problems. Stroh, the No. 3 brewer, was off 1.6%; Heileman 2.9%; and Pabst 7.8%.

Overall, domestics were off 1.1%, down to 175.6 million beer barrels in '84 versus 177.5 in 1983.

There were numerous changes in the Top 10 brands. Only two retained their same slot versus the 1983 Top 10.

Budweiser remains first and Coors is still fourth. But Miller Lite jumped ahead of

(Continued on page 70)

Brewers' estimated market shares

	1979	1981	1983	1984E
Anheuser-Busch	26.8%	30.0%	33.6%	35.9%
Miller	20.8	22.2	20.8	21.3
Stroh	15.3	12.9	13.5	13.4
Heileman	6.6	7.7	9.7	9.6
Coors	7.5	7.3	7.6	7.5
Pabst	12.3	10.5	7.1	6.6
Genesee	2.0	2.0	1.8	1.7
Schmidt	2.2	1.6	1.7	1.6
Pittsburgh	0.4	0.5	0.6	0.5
Others, Net*	6.1	5.3	3.6	1.9
Total	100.0%	100.0%	100.0%	100.0%

* Includes imports and excludes tax-free

Source: John C. Maxwell Laidlaw Ansbacher Inc.

Copyright: **Beverage Industry** January 1985

Production by brand

(mil. bbls.)

	1977	1978	1979	1980	1981	1982	1983	1984E
Anheuser-Busch								
Budweiser	25.0	27.0	31.9	34.6	38.1	40.6	42.7	44.3
Michelob	8.2	7.5	8.0	8.0	7.7	7.4	7.0	6.7
Busch & Busch Bavarian	3.4	3.6	3.2	2.8	3.1	3.4	3.4	4.3
Bud Light	-	-	-	-	-	3.3	3.7	4.0
Michelob Light	-	1.0	2.0	2.4	2.7	2.9	2.7	2.8
A-B Natural Light	1.9	2.5	2.0	2.4	1.9	1.5	1.0	1.2
LA	-	-	-	-	-	-	-	0.4
Other	-	-	-	-	-	-	-	0.1
Total	36.5	41.6	46.2	50.2	54.5	59.1	60.5	63.8
Miller								
Lite	7.5	9.5	11.2	13.2	16.3	17.2	17.9	18.0
High Life	16.5	20.8	23.8	22.7	22.3	20.4	17.0	14.5
Meister Brau	-	-	-	-	-	-	0.6	2.0
Milwaukee's Best	-	-	-	-	-	-	-	2.0
Lowenbrau	0.2	1.0	0.9	1.2	1.5	1.4	1.5	1.2
Other	-	-	0.1	0.1	0.2	0.3	0.4	0.2
Total	24.2	31.3	36.8	37.2	40.3	39.3	37.4	37.9
Stroh								
Old Milwaukee		3.6	3.7	4.2	5.1	6.0	7.6	7.1
Stroh		-	-	5.7	5.5	5.4	5.5	5.3
Schaefer		-	-	3.6	3.0	2.5	3.0	4.0
Schlitz Malt		1.8	1.9	2.3	2.5	2.6	2.6	2.1
Schlitz		13.0	10.5	7.5	5.7	4.1	3.2	1.7
Old Milwaukee Light		-	-	-	-	0.8	1.0	1.5
Stroh Light		-	-	0.5	0.6	0.6	0.7	0.8
Goebel		-	-	-	-	0.3	0.3	0.6
Schlitz Light		0.8	0.6	0.4	0.3	0.4	0.3	0.1
Erlanger		-	-	0.4	0.5	0.1	-	-
Other		0.4	0.1	0.2	0.2	0.1	0.1	0.7
Total		29.8	26.4	24.8	23.4	22.9	24.3	23.9
Heileman								
Old Style & Light & Export				4.8	5.4	5.6	5.6	5.1
Schmidt/Rainer				1.6	1.7	2.0	2.3	2.4
Carling Black Label & Light				0.8	1.0	1.6	1.9	2.1
Colt 45				1.1	1.2	1.5	1.6	1.7
Blatz & Light				1.3	1.5	1.7	1.8	1.6
Red, White & Blue				-	-	-	0.9*	1.1
Blitz				-	-	-	0.6*	0.8
Lone Star				-	-	-	0.6*	0.8
Other				3.7	3.2	2.1	2.0	1.4
Total				13.3	14.0	14.5	17.5	17.0
Coors								
Coors		12.1	11.3	11.4	10.1	8.5	9.7	8.7
Coors Light		0.5	1.6	2.4	3.1	3.2	3.8	4.5
Others		-	-	-	0.1	0.2	0.2	0.2
Total		12.6	12.9	13.8	13.3	11.9	13.7	13.4
Pabst								
Pabst		12.7	12.3	11.2	9.6	8.6	7.4	6.5
Hamms & Light		-	-	-	-	-	2.0*	2.0
Olympia		-	-	-	-	-	1.0*	1.0
Olde English (Malt)		0.5	0.7	1.0	1.1	0.9	1.0	0.9
Pabst Extra Light		0.6	0.7	0.6	0.5	0.5	0.3	0.3
Olympia Gold		-	-	-	-	-	0.2*	0.3
Pabst Light		-	-	-	-	-	-	0.3
Jacob Best		-	-	-	-	0.4	0.3	0.2
Andeker		-	-	-	0.1	0.1	0.1	0.1
Olympia Light		-	-	-	-	-	-	0.1
Maxx		-	-	-	-	-	-	0.1
Lone Star		-	-	-	-	-	0.3#	-
Red, White & Blue		0.5	0.9	1.2	1.3	1.0	0.2*	-
Blitz		0.3	0.5	0.8	0.5	0.6	-	-
Other		0.8	-	0.3	0.4	0.2	-	-
Total		22.1	21.1	21.2	19.2	17.5	12.8	11.8

* Nine months
# Three months

Source: John C. Maxwell Laidlaw Ansbacher

Copyright: **Beverage Industry** January 1985

Estimated malt liquor sales volume (000 barrels)

	1974	1975	1978	1981	1982	1983	1984E
Schlitz (Stroh)	700	1,300	1,800	2,500	2,600	2,600	2,100
Colt 45 (Heileman)	1,950	1,300	1,350	1,200	1,500	1,600	1,700
Olde English (Pabst)	—	—	500	1,100	900	1,000	900
Champale (Iroquois)	285	400	700	400	400	400	400
Mickey's (Heileman)	—	—	—	400	500	500	400
Country Club (Pearl)	700	550	400	200	—	—	—
Magnum (Philip Morris)	—	—	—	200	300	200	300
Malt Duck (Heileman)	—	80	125	75	100	100	75
Bud Malt (Anheuser-Busch)	200	—	—	—	—	—	—
900 (Pearl)	—	—	—	—	—	—	—
Subtotal	2,935	3,630	4,875	6,075	6,300	6,400	5,775
All Others	250	120	50	50	50	50	50
Total	3,185	3,750	4,925	6,125	6,350	6,450	5,825

*Terminated.

Source: John C. Maxwell
Laidlaw Analeacher Inc.

Copyright: Beverage Industry
January 1985

Beer consumption down .6% in '84

(Continued from page 68)

Miller High Life for the second most popular brand. Old Milwaukee and Michelob moved past Pabst into the fifth and sixth spots as Pabst slid into seventh. In the eighth and ninth positions, Stroh jumped ahead of Heileman's Old Style. The only new entry was Coors Light, which displaced Bud Light for the tenth spot.

The new and much-ballyhooed low-alcohol category has had little impact on the industry in terms of sales in '84. A-B's LA, with sales of 400,000 barrels, is the only low-alcohol beer with a measureable market share, according to Maxwell.

But Maxwell says it's still too early to tell what kind of sales volume the category will command.

And in a speech presented at InterBev, Peter Mitchell, worldwide brands manager, Guinness Brewing Worldwide, said, "If we concentrate, for example, just on the non-alcoholic beer business here in the U.S.A., there is evidence of spectacular growth starting to occur although admittedly from very small bases."

Sales were much stronger for imports, up 12.6% for the year over '83. (See related story, page 73.)

Looking to '85

Overall, Maxwell projects the beer industry will have a difficult time growing in 1985. He predicts higher excise taxes and/or price increases, converting sales to the low-priced "popular" brands at the expense of premiums and super premiums.

Other problems also remain, though. Anti-alcohol sentiment continues to plague the industry with groups like Mothers Against Drunk Driving (MADD) putting lobbying pressure on the government.

The consumer trend toward dieting and health-consciousness has probably cost the industry some sales, and will likely continue to do so in '85.

Demographics may be another force working against the industry.

"With an aging population, a greater proportion of consumers now have an interest in more moderate levels of alcohol consumption," explained Guinness' Mitchell in his InterBev speech.

Some groups are continuing to attempt to limit, if not outright ban, TV advertising for beer and wine.

Stop Marketing Alcohol on Radio and TV (SMART) is a coalition comprised of many groups including the Center for Science in the Public Interest and the National Parents-Teachers Assn. that is leading the lobbying effort to halt the TV advertising.

Arnold Fege, in charge of governmental relations for the PTA, says the advertising is "terribly biased" and is fighting for either "equal time advertising" or an outright ban on the advertising.

While many question the impact the coaliton will have, there's no doubt this is another worry for the industry.

Capacity problems

With an estimated capacity

(Continued on page 73)

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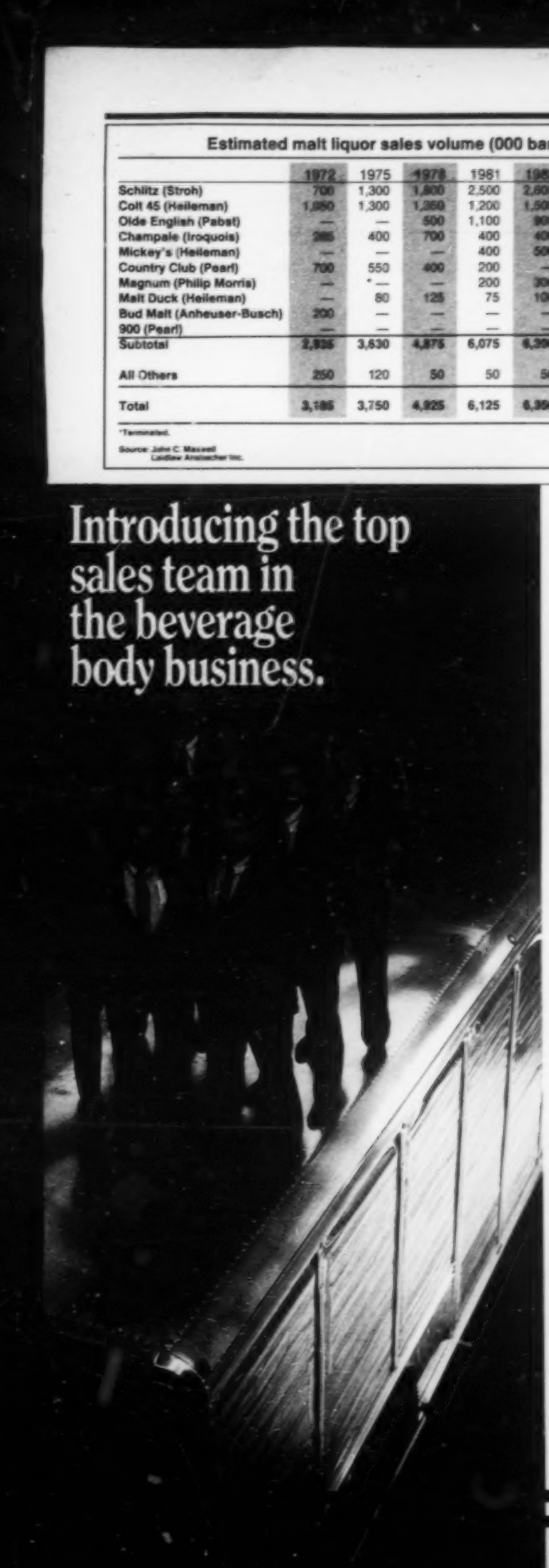

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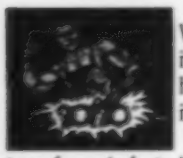

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Beer consumption down .6% in 1984

Brewers' production
(mil. bbls.)

	1972	1975	1978	1981	1982	1983	1984E	Year-end Capacity 1984E
Anheuser-Busch	25.6	35.2	41.8	54.5	59.1	60.5	63.8	71.0
Miller	5.4 (k)	12.9	31.3	40.3	39.3	37.4	37.9	44.0 (l)
Stroh (a)	28.6	34.3	29.8	23.4	22.9	24.3	23.9	30.0
Heileman (b)	9.9	10.0	10.5	14.0	14.5	17.5	17.0	26.0
Coors	9.8	11.9	12.8	13.3	11.9	13.7	13.4	15.0
Pabst (c)	16.9	22.3	22.1	19.2	17.5	12.8	11.8	14.0
Genesee	1.7	2.4	3.0	3.6	3.4	3.2	3.0	3.3
Schmidt	3.2	3.3	3.8	3.2	3.2	3.1	2.9	4.3
Pittsburgh	0.8 (f)	0.9	0.6	0.9 (f)	1.0	1.0	0.9	1.2
All Others	31.0	17.3	9.3	6.8	6.2	6.6	3.4	14.7
	133.9	150.5	164.6	179.2	179.0	180.1	178.0	223.5
Less Tax-free Exports and Military	2.1	1.9	2.6	2.5	2.4	2.6	2.4	
	131.8	148.6	162.0	176.7	176.6	177.5	175.6	
% Increase	3.5%	2.1%	3.8%	1.9%	(0.1)%	0.5%	(1.1)%	
Imports	0.9	1.7	3.5	5.2	5.8	6.3	7.1	
Consumption	132.7	150.3	165.5	181.9	182.4	183.8	182.7	
% Increase	3.4%	2.3%	4.4%	2.2%	0.3%	0.8%	(0.6)%	

(a) Schaefer & Stroh combined for all years; Schlitz is now part of Stroh.
(b) Includes Carling National for all periods except first three months of 1979.
(c) Reflects combination of Pabst and Olympia.
(d) Pro forma for purchase of Meister Brau as of July 1972.
(e) General has now been absorbed into "All Others."
(f) Strikes in August-September 1972 and May 1982.
(g) Impacted by Strike.
(h) A 40-day strike in April-May had an adverse effect on sales of Stroh.
(i) Includes Rheingold as of December; Rhengold's previous volume included in All Others.
(j) Pro forma for Pearl acquisition in January 1978.
(k) Includes Blitz.
(l) Does not include Trenton.

Source: John C. Maxwell
Laidlaw Ansbacher Inc.

Copyright: **Beverage Industry**
January 1985

(Continued from page 70)
to produce 223.5 million barrels, the industry currently has an overcapacity of about 26%. (This does not include the mothballed Miller brewery in Trenton, OH.)

Without a dramatic turnaround in sales, which no one anticipates, this problem is not expected to be solved easily.

The recent sale of Pabst brands to Heileman (with parts subsequently being sold to S&P Co.) will allow some geographic expansion of existing brands, but if total sales are not expanded all these expansions will only cannibalize existing market shares.

With the Pabst acquisition Heileman is picking up some 7.9 million barrels of consumption, including 6.5 million barrels in the flagship brand. S&P Co. is adding 3.9 million barrels, including Pabst's number two brand, Hamms.

With all of its problems, though, the entire outlook for the future is not gloom and doom.

Maxwell foresees a bright future for Anheuser-Busch with volume anticipated to increase 4%-5% in 1985. He expects Miller's unit volume to at best increase modestly in '85, but does not anticipate an immediate turnaround of the High Life problem.

He projects continued strong growth for imports. "We expect the industry (imports) to be up 8%-10% during 1985." □

Leading imported beer brands
(mil. gallons)

	1980	Pct. of Market	1981	Pct. of Market	1982	Pct. of Market	1983	Pct. of Market	1984E	Pct. of Market	Change
Heineken	53.5	37.8%	62.9	38.9%	68.7	38.5%	72.8	37.8%	74.0	34.1%	1.6%
Molson	31.7	22.4	32.0	19.8	32.0	17.9	30.6	15.9	29.5	13.4	(3.4)
Becks	7.3	5.1	10.0	6.2	14.0	7.8	18.4	9.6	24.0	11.1	30.4
Moosehead	5.6	4.0	7.9	4.9	11.2	6.3	13.5	7.0	16.0	7.4	18.5
Labatt	6.9	4.9	9.0	5.6	9.5	5.3	9.8	5.1	10.0	4.6	2.0
St. Pauli Girl	2.4	1.7	3.0	1.8	4.5	2.5	7.0	3.6	7.5	3.4	7.1
Dos Equis	7.0	4.9	7.0	4.3	6.0	3.4	6.5	3.4	7.0	3.2	7.7
Carling O'Keefe	—	—	4.5	2.8	4.0	2.2	5.5	2.9	5.0	2.5	(9.0)
Amstel Light	0.5	0.3	0.7	0.4	1.1	0.6	2.5	1.3	4.0	1.8	60.0
Corona Extra	—	—	—	—	0.2	0.1	1.7	0.9	3.8	1.8	123.5
Tecate	—	—	3.8	2.3	2.7	1.5	3.0	1.6	3.5	1.6	16.7
Guinness	2.2	1.6	2.3	1.4	2.5	1.4	2.7	1.4	3.0	1.4	11.1
Foster	1.6	1.1	1.7	1.1	1.7*	1.0	2.5	1.3	3.0	1.4	20.0
Grolsch	1.6	1.1	1.8	1.1	1.5	0.8	2.0	1.0	2.3	1.1	15.0
Kronenbourg	0.7	0.5	1.2	0.7	1.4	0.8	1.3	0.7	2.2	1.0	69.2
Kirin	—	—	1.4	0.7	1.3	0.7	1.7	0.9	2.0	0.9	17.6
Grizzly	—	—	—	—	—	—	—	—	2.0	0.9	—
Tsingtao	0.4	0.3	0.8	0.5	1.0	0.6	1.4	0.7	2.0	0.9	42.9
Bass Ale	0.9	0.6	1.0	0.6	1.1	0.6	1.4	0.7	1.7	0.8	21.4
San Miguel	—	—	1.1	0.7	1.4	0.8	1.4	0.7	1.5	0.7	7.1
Carta Blanca	2.1	1.5	2.3	1.4	1.3	0.7	1.2	0.6	1.5	0.7	25.0
DAB	—	—	—	—	0.7	0.4	1.2	0.6	1.5	0.7	25.0
Carlsburg	—	—	—	—	0.7	0.4	1.0	0.5	1.3	0.6	30.0
Watney's	—	—	—	—	—	—	—	—	1.1	0.5	—
Steinlager	—	—	—	—	—	—	—	—	1.1	0.5	—
John Courage	—	—	—	—	—	—	0.7	0.4	1.0	0.5	42.9
Nordik Wolf Light	—	—	—	—	—	—	—	—	0.9	0.4	—
Harp	0.4	0.3	0.4	0.2	0.5	0.3	0.6	0.3	0.7	0.3	16.7
Alten Munster	—	—	0.1	0.1	0.2	0.1	0.4	0.2	0.6	0.3	50.0
Bohemia	—	—	0.7	0.4	0.9	0.5	0.6	0.3	0.5	0.2	(16.7)
Whitbred	—	—	—	—	—	—	—	—	0.5	0.2	—
Warsteiner	—	—	—	—	0.1	—	0.2	0.1	0.3	0.1	50.0
Samuel Smith	—	—	0.1	0.1	0.1	0.1	0.2	0.1	0.3	0.1	50.0
Oranjeboom	—	—	—	—	—	—	—	—	0.3	0.1	—
Raffo	—	—	—	—	—	0.1	0.1	0.1	0.1	0.1	—
Sagres	—	—	—	—	—	—	0.1	—	0.1	0.1	—
Others	15.8	11.9	6.1	3.8	5.2	4.6	0.6	0.3	1.0	0.5	66.7
Total	141.9	100.0%	161.9	100.0%	178.4	100.0%	192.8	100.0%	218.8	100.0%	12.6%

* Adversely affected by 2½ month strike in summer of 1982.

Source: John C. Maxwell
Laid law Anspacher Inc.

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January 1985

Imports up 12.6%

One of the few genuinely bright segments for the beer industry continues to be imports. The segment grew 12.6% in '84 to 216.8 million gallons versus 192.6 million gallons in '83.

All of the top ten import brands gained market share except for number two, Molson, down 3.4% and number eight, Carling O'Keefe, down 9%.

Heineken continues to dominate the category, up 1.6% with a 34.1% market share. Molson is second with a 13.4% share. Becks is third with a 11.1%, up 30.4%. Moosehead is fourth with a 7.4% share, up 18.5%. In fifth place is Labatt with a 4.6% share, up 2%.

Rounding out the top ten are: St. Pauli Girl, 3.4% share, up 7.1%; Dos Equis, 3.2% share, up 7.7%; Carling O'Keefe, 2.5% share; Amstel Light, 1.8% share, up 60%; Corona Extra, 1.8%, up 123.5%.

Corona Light more than doubled its volume and moved from 15th place to make the top ten. Amstel Light is also a newcomer on the top ten list, moving up from 11th in 1983.

Other imports that showed strong growth in '84 include: Kronenbourg 69.2%; Alten Munster 50%; Warsteiner 50%; Samuel Smith 50%; John Courage 42.9%; Tsingtao 42.9%; Carlsburg 30%; Carta Blanca 25%; DAB 25%; Bass Ale 21.4%; Foster 20%; Kirin 17.6%; Tecate 16.7%; Harp 16.7%; Grolsch 15%.

For the first time in years, price is begining to play a role in the increased consumption of imports. The favorable exchange rate between the U.S. dollar and foreign currency has made these brands competitive with premium and super premium domestics.

Outlook through 1985 is good, and continued strong growth is anticipated, expected to be up 8%-10% in 1985 with some Canadian brands slowing and Mexican beers expanding. □